

2A Paul Harvey Wallace (Estate)**Case No. 08CEPR00294****Atty Donaldson, Larry A. (pro per – former Executor)****Atty Kruthers, Heather H. (for Public Administrator – successor Administrator)****Amended Trust Accounting for 2007, 2008, 2009, 2010, 2011, 2012 and Partial Accounting 2013**

DOD: 06/22/07	<p>LARRY A. DONALDSON, friend, was appointed as Executor without bond on 05/27/08 and Letters were issued on 06/18/08.</p> <p>The Court accepted Mr. Donaldson's withdrawal as executor on 7/26/1 and appointed the Public Administrator. Letters of Administration were issued to the Public Administrator on 08/01/13.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>See Page 7 for a related matter.</p> <p><u>CONTINUED FROM 01/21/15</u></p> <p>Minute Order from 01/21/15 states: Mr. Rindlisbacher represents that all of the necessary information is with the accountant and he is working on the final review of the accounting; needs 30-60 days. If the accounting is filed at least 2 days prior to the hearing date, then Mr. Rindlisbacher does not have to appear at the hearing. However, Larry Donaldson is ordered to be personally present in court on 03/25/15. The Court orders the related Paul Harvey Wallace Trust matter be set for 03/25/15 as well.</p> <p>As of 03/20/15, nothing further has been filed.</p> <p>1. The accounting does not comply with the Probate Code, specifically the format for accountings outlined in Probate Code §1060. In addition the accounting appears to be for the Paul Harvey Wallace Trust. The Paul Harvey Wallace Trust is not before the court. Mr. Donaldson needs to file an accounting for the Estate of Paul Harvey Wallace.</p>
Cont. from 040714, 050514, 070714, 090814, 102314, 012115		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: JF
		Reviewed on: 03/20/15
		Updates:
		Recommendation:
		File 2A – Wallace

2A

2B Paul Harvey Wallace (Estate)

Atty Donaldson, Larry A. (former Executor)

Atty Kruthers, Heather H. (for Public Administrator – Successor Administrator)

Case No. 08CEPR00294

Order to Show Cause Re: Failure to Appear; Imposition of Sanctions in the Amount of \$600.00

DOD: 06/22/07	LARRY A. DONALDSON , friend, was appointed as Executor without bond on 05/27/08 and Letters were issued on 06/18/08.	NEEDS/PROBLEMS/COMMENTS: CONTINUED FROM 01/21/15 Minute Order from 01/21/15 states: Mr. Rindlisbacher represents that all of the necessary information is with the accountant and he is working on the final review of the accounting; needs 30-60 days. If the accounting is filed at least 2 days prior to the hearing date, then Mr. Rindlisbacher does not have to appear at the hearing. However, Larry Donaldson is ordered to be personally present in court on 03/25/15. The Court orders the related Paul Harvey Wallace Trust matter be set for 03/25/15 as well. As of 03/20/15, nothing further has been filed.
Cont. from 010214, 013014, 022014, 041714, 050514, 070714, 090814, 102314, 012115	On 07/26/13, LARRY DONALDSON resigned as Executor and the PUBLIC ADMINISTRATOR , was appointed as Administrator. Letters of Administration were issued to the Public Administrator on 08/01/13.	
Aff.Sub.Wit.	Minute order from 12/05/13 set this matter for an Order to Show Cause and states: The Court sets the matter for an Order to Show Cause on 01/02/14 regarding Larry Donaldson's failure to appear and imposition of sanctions in the amount of \$600.00. The Court sets a further Order to Show Cause on 01/02/14 regarding Larry Donaldson's failure to provide information to the successor administrator timely and imposition of sanctions in the amount of \$800.00. Larry Donaldson is ordered to be personally present on 01/02/14.	
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: JF
		Reviewed on: 03/20/15
		Updates:
		Recommendation:
		File 2B – Wallace

2B

Order to Show Cause Re: Failure to Provide Information to the Successor Administrator Timely; Imposition of Sanctions in the Amount of \$800.00

DOD: 06/22/07		LARRY A. DONALDSON, friend, was appointed as Executor without bond on 05/27/08 and Letters were issued on 06/18/08.	NEEDS/PROBLEMS/COMMENTS:
		On 07/26/13, LARRY DONALDSON resigned as Executor and the PUBLIC ADMINISTRATOR , was appointed as Administrator. Letters of Administration were issued to the Public Administrator on 08/01/13.	CONTINUED FROM 10/23/14 Minute Order from 01/21/15 states: Mr. Rindlisbacher represents that all of the necessary information is with the accountant and he is working on the final review of the accounting; needs 30-60 days. If the accounting is filed at least 2 days prior to the hearing date, then Mr. Rindlisbacher does not have to appear at the hearing. However, Larry Donaldson is ordered to be personally present in court on 03/25/15. The Court orders the related Paul Harvey Wallace Trust matter be set for 03/25/15 as well.
Cont. from 010214, 013014, 022014, 050514, 070714, 090814, 102314, 012115			
Aff.Sub.Wit.		Minute order from 12/05/13 set this matter for an Order to Show Cause and states: The Court sets the matter for an Order to Show Cause on 01/02/14 regarding Larry Donaldson's failure to appear and imposition of sanctions in the amount of \$600.00. The Court sets a further Order to Show Cause on 01/02/14 regarding Larry Donaldson's failure to provide information to the successor administrator timely and imposition of sanctions in the amount of \$800.00. Larry Donaldson is ordered to be personally present on 01/02/14.	As of 03/20/15, nothing further has been filed.
Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			

3 Victoria L. Hudgins (Estate)**Case No. 12CEPR01146****Atty Shepard, Jeff S. (for Petitioners Kevin Hudgins and Danielle Dutra)****1) First and Final Report of Administration; 2) Petition for Allowance of Statutory Fees to Attorney; and 3) for Final Distribution on Waivers of Accounting**

DOD: 12/18/12	KEVIN HUDGINS and DANIELLE DUTRA, Co-Executors, are petitioners.	NEEDS/PROBLEMS/COMMENTS:
	Accounting is waived.	
Cont. from	I & A - \$1,394,500.00	
Aff.Sub.Wit.	POH - \$1,282,000.00	
✓ Verified	Executors - waive	
✓ Inventory	Attorney - \$26,945.00	
✓ PTC	(statutory)	
✓ Not.Cred.	Distribution, pursuant to Decedent's Will, is to:	
✓ Notice of Hrg	Kevin Hudgins - real	
✓ Aff.Mail W/	property located at 2515 McCall Ave.	
Aff.Pub.	Selma, ½ interest in the residue	
Sp.Ntc.	consisting of Page Funeral Chapel,	
Pers.Serv.	2014 Arrants, Selma and furniture and	
Conf. Screen	furnishings.	
✓ Letters	Danielle Dutra - ½ interest in	
Duties/Supp	the residue consisting of Page Funeral	
Objections	Chapel, 2014 Arrants, Selma and	
Video Receipt	furniture and furnishings.	
CI Report		
✓ 9202		
✓ Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
✓ FTB Notice		
		Reviewed by: KT
		Reviewed on: 3/23/15
		Updates:
		Recommendation: SUBMITTED
		File 3 - Hudgins

Atty Shepard, Jeff S. (for Petitioners Kevin Hudgins and Danielle Dutra)

1) First and Final Report of Administration; 2) Petition for Allowance of Statutory Fees to Attorney; and 3) for Final Distribution on Waiver of Accounting

DOD: 4/20/2013		KEVIN HUDGINS and DANIELLE DUTRA , grandchildren and Co-Executors, are Petitioners.	NEEDS/PROBLEMS/COMMENTS:
			Page 3 is the related case of the <i>Estate of Victoria Hudgins</i> , (daughter) 12CEPR01146.
Cont. from		Accounting is waived.	
	Aff.Sub.Wit.	I & A — \$284,418.55	
✓	Verified	POH — \$284,418.55 (no cash)	
✓	Inventory		
✓	PTC	Executors — waive	
✓	Not.Cred.		
✓	Notice of Hrg	Attorney — \$8,688.37 (statutory; to be paid outside probate;)	
✓	Aff.Mail	Attorney X/O — waives (waives \$2,400.00 fee for 12 hours @ \$200.00/hour for meetings and negotiations between parties regarding dispute and potential settlement options, preparation of agreement and assignment of interest;)	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters 090413	Distribution, pursuant to Decedent's Will and Assignment filed 10/14/2014 is to:	
	Duties/Supp		
	Objections	PAULETTE A. HALFORD - \$2,000.00 per month from payments on a promissory note, for so long as she lives and the note remains unpaid;	
	Video Receipt		
	CI Report		
✓	9202	KEVIN HUDGINS - 50% interest in the residue consisting of Installment Note dated 2/20/2008;	
✓	Order		
	Aff. Posting		
	Status Rpt	DANIELLE DUTRA - 50% interest in the residue consisting of Installment Note dated 2/20/2008.	
	UCCJEA		
	Citation		
✓	FTB Notice		

Reviewed by: LEG
Reviewed on: 3/23/15
Updates:
Recommendation: SUBMITTED
File 4 – Page

Atty **Armas, J. Todd (representing himself as Executor/Petitioner)****Petition for Termination of Further Proceedings and Discharging Personal Representative**

DOD: 06/28/12	TODD J. ARMAS , Executor, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
Cont. from	Petitioner states that the Petition for Probate alleged that there were assets to be administered in this estate exceeding \$100,000.00. An Inventory & Appraisal was filed 10/31/14 indicating a real property asset of the estate valued at \$75,000.00. Subsequently, Petitioner discovered that the real property asset was held in joint tenancy between the decedent and Kirby Mathershed and is therefore no subject to administration. Petitioner further alleges that he has diligently searched for assets of the decedent, but has not discovered any property of any kind belonging to the estate and subject to administration.	
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified		
<input type="checkbox"/> Inventory		
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg		
<input checked="" type="checkbox"/> Aff.Mail	w/o	
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen		
<input type="checkbox"/> Letters		
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: JF
		Reviewed on: 03/25/15
		Updates:
		Recommendation:
		File 5 - Cole

Amended First and Final Account and Report of Conservator; Petition for Allowance of Compensation to Conservator and his Attorney; and Distribution

Age: 05/15/14		PUBLIC GUARDIAN , Conservator, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Account period: 10/09/13 – 05/15/14	
		Accounting: \$115,581.70	
		Beginning POH: \$ 3,495.00	
		Ending POH: \$ 82,823.72 (\$3,495.00 is cash)	
Cont. from			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail	w/	
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report	n/a	
<input type="checkbox"/>	9202	n/a	
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
		Subsequent Account period: 05/16/14 – 12/31/14	
		Accounting: \$86,462.38	
		Beginning POH: \$82,823.72	
		Ending POH: \$76,068.70 (all cash)	
		Conservator: \$1,687.44 (for 11.64 Deputy hours @ \$96/hr plus 7.50 Staff hours @ \$76/hr, per declaration, including estimated time for management of finances, preparation of income tax returns, preparing statement of services, and making final distribution, pursuant to attached declaration)	
		Attorney: \$2,000.00 (less than allowed under Local Rule 7.16.B.1, since the Public Guardian did not have to file the paperwork to establish the conservatorship.)	
		Bond fee: \$145.44 (OK)	
		Costs: \$104.00 (for certified Letters)	
		Petitioner states the Conservatee died testate on 5-15-14. Her will was deposited by the Public Guardian on 8-14-14 (Exhibit E) and heirs are listed in the petition. However, the Conservatee received Medi-Cal benefits before she died and Notice of the Conservatee's death was sent to Medi-Cal on 5-16-14. They sent a claim for \$191,000.00.	
		After payment of the allowed commissions, fees and costs totaling \$3,936.88, Petitioner requests distribution of the remaining estate of \$72,131.82 to Medi-Cal.	
			Reviewed by: JF
			Reviewed on: 03/25/15
			Updates:
			Recommendation:
			File 6 - Lyster

7 Paul Harvey Wallace Trust

Case No. 14CEPR00601

Atty Petoyan, Marcus (for Laura Leonard – beneficiary/Petitioner)
Atty Kruthers, Heather (for Public Administrator – successor trustee)

Probate Status Hearing RE: Account

DOD: 06/22/07	LAURA LEONARD , step-daughter and beneficiary of the Trust, filed a PETITION FOR ORDER ACCEPTING RESIGNATION OF TRUSTEE AND FOR APPOINTMENT OF THE FRESNO COUNTY PUBLIC ADMINISTRATOR SUCCESSOR TRUSTEE on 07/02/14. On 08/25/14, the Petition was granted and the PUBLIC ADMINISTRATOR was appointed as Sucessor Trustee. Minute Order in related matter estate matter for Paul Harvey Wallace set this matter for a status hearing on 3/25/15.	NEEDS/PROBLEMS/COMMENTS: See pages 2A, 2B and 2C for related matter.
Cont. from		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
Reviewed by: JF		
Reviewed on: 03/20/15		
Updates:		
Recommendation:		
File 7 - Wallace		

Order to Show Cause RE: Failure to Appear and Failure to File the Inventory and Appraisal

DOD: 4-14-14	RAYNETTE GRANT , Sister, was appointed Executor with Full IAEA with bond of \$60,000.00 on 9-25-14.	NEEDS/PROBLEMS/COMMENTS: <u>Note:</u> Final I&A was filed 2-5-15. <u>Minute Order 2-11-15:</u> Mr. Shepard and Raynette Grant are both ordered to be personally present on 3-25-15; the Court will take of the issue of increased bond on that date.
Cont 021115	Bond was filed 10-2-14 and Letters issued 10-16-14.	
<input type="checkbox"/> Aff.Sub.Wit.	At the hearing on 9-25-14, the Court set status hearing for the filing of the Inventory and Appraisal for 1-28-15.	
<input type="checkbox"/> Verified		
<input checked="" type="checkbox"/> Inventory		
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.	On 1-28-15, there were no appearances. The Court set this OSC Re Failure to Appear and Failure to file the Inventory and Appraisal and ordered both the attorney and the executor to be personally present in Court on 2-11-15.	
<input type="checkbox"/> Notice of Hrg		
<input type="checkbox"/> Aff.Mail		
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.	Final I&A was filed 2-5-15 and indicates a total estate value of \$113,395.69 including \$2,486.19 cash, various vehicles and equipment, and a 40% undivided interest in real property.	
<input type="checkbox"/> Conf. Screen		
<input type="checkbox"/> Letters		
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections	Status Report by Attorney filed 3-20-15 states there was an inadvertent error in that the hearing dates of 1-28-15 and 2-1-15 were not posted on his calendar which resulted in his failure to appear. The Inventory and Appraisal of the estate has been filed and there was an assumption that the filing of the I&A removed the hearing from the court calendar. The estate is not in a condition to be closed; there are not yet sufficient funds available for payment of the decedent's debts. The attorney and the Executor will be in Court on 3-25-15 as ordered.	
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt	Reviewed by: skc	
<input type="checkbox"/> UCCJEA	Reviewed on: 3-23-15	
<input type="checkbox"/> Citation	Updates:	
<input type="checkbox"/> FTB Notice	Recommendation:	
	File 8 - Rowley	

Petition for Letters of Administration; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

DOD: 06/23/2015		CHRISTOPHER B. DAVIS , son, is petitioner and requests appointment as Administrator without bond.	NEEDS/PROBLEMS/COMMENTS:
		Sole heir waives bond	<p>1. Need Affidavit of Publication in the correct newspaper pursuant to Local Rule 7.9A.</p> <p>2. Proposed personal representative is a resident of Arizona. Probate Code 8571 states notwithstanding a waiver of bond, the court in its discretion may require a nonresident personal representative to give a bond in an amount determined by the court.</p> <p>Note: If the petition is granted status hearings will be set as follows:</p> <ul style="list-style-type: none"> • Wednesday, 07/22/2015 at 9:00a.m. in Dept. 303 for the filing of the inventory and appraisal <u>and</u> • Wednesday, 05/25/2016 at 9:00a.m. in Dept. 303 for the filing of the first account and final distribution. <p>Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.</p>
Cont. from		Petitioner is a residence of Dewey, Arizona.	
<input type="checkbox"/>	Aff.Sub.Wit.	Full IAEA - ?	
<input checked="" type="checkbox"/>	Verified	Decedent died intestate	
<input type="checkbox"/>	Inventory	Residence: Kerman Publication: Need	
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg	Estimated value of the Estate:	
<input checked="" type="checkbox"/>	Aff.Mail	Real property - \$482,000.00	
<input type="checkbox"/>	Aff.Pub.	Probate Referee: Steven Diebert	
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters		
<input checked="" type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		

Reviewed by: LV
Reviewed on: 03/20/2015
Updates:
Recommendation:
File 9 - Davis

See petition for details.			NEEDS/PROBLEMS/ COMMENTS:
			Court Investigator advised rights 3-12-15
			Voting rights affected – need minute order.
			<u>Note:</u> Notice of Hearing filed 2-13-15 indicated that a daughter, Carol Thompson, is homeless and here whereabouts are unknown. Pursuant to the Minute Order of 2-24- 15, the Public Guardian is to make efforts to locate the daughter and report back to the Court at the general hearing.
			<u>Note:</u> The Court will set status hearings as follows:
			<ul style="list-style-type: none"> • Wed, August 26, 2015 for the filing of the Inventory and Appraisal • Wed, June 22, 2015 for the filing of the first account
			If the proper items are on file prior to the status dates, the status hearings may be taken off calendar.
			Reviewed by: skc
			Reviewed on: 3-23-15
			Updates:
			Recommendation:
			File 10 - Beatty

	Aff.Sub.Wit.	
✓	Verified	
	Inventory	
	PTC	
	Not.Cred.	
✓	Notice of Hrg	
✓	Aff.Mail	W
	Aff.Pub.	
	Sp.Ntc.	
✓	Pers.Serv.	W
	Conf. Screen	
✓	Letters	
	Duties/Supp	
	Objections	
	Video Receipt	
✓	CI Report	
	9202	
✓	Order	
	Aff. Posting	
	Status Rpt	
	UCCJEA	
✓	Citation	
	FTB Notice	

Petition for Letters of Administration; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

DOD: 10/04/2014		<p>RICKY R. LOCKHART, surviving spouse is petitioner and requests appointment as Administrator without bond.</p> <p>All heirs waive bond</p> <p>Full IAEA – o.k.</p> <p>Decedent died intestate</p> <p>Residence: Fresno Publication: The Business Journal</p> <p>Estimated value of the Estate:</p> <table> <tr> <td>Personal property</td> <td>-</td> <td>\$50,000.00</td> </tr> <tr> <td>Real property</td> <td>-</td> <td>\$250,000.00</td> </tr> <tr> <td>Total</td> <td>-</td> <td>\$300,000.00</td> </tr> </table> <p>Probate Referee: Steven Diebert</p>	Personal property	-	\$50,000.00	Real property	-	\$250,000.00	Total	-	\$300,000.00	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note: If the petition is granted status hearings will be set as follows:</p> <ul style="list-style-type: none"> • Wednesday, 07/22/2015 at 9:00a.m. in Dept. 303 for the filing of the inventory and appraisal <u>and</u> • Wednesday, 05/25/2016 at 9:00a.m. in Dept. 303 for the filing of the first account and final distribution. <p>Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.</p>
Personal property	-		\$50,000.00									
Real property	-		\$250,000.00									
Total	-		\$300,000.00									
Cont. from												
<input type="checkbox"/>	Aff.Sub.Wit.											
<input checked="" type="checkbox"/>	Verified											
<input type="checkbox"/>	Inventory											
<input type="checkbox"/>	PTC											
<input type="checkbox"/>	Not.Cred.											
<input checked="" type="checkbox"/>	Notice of Hrg											
<input checked="" type="checkbox"/>	Aff.Mail		w/									
<input checked="" type="checkbox"/>	Aff.Pub.											
<input type="checkbox"/>	Sp.Ntc.											
<input type="checkbox"/>	Pers.Serv.											
<input type="checkbox"/>	Conf. Screen											
<input checked="" type="checkbox"/>	Letters											
<input checked="" type="checkbox"/>	Duties/Supp											
<input type="checkbox"/>	Objections											
<input type="checkbox"/>	Video Receipt											
<input type="checkbox"/>	CI Report											
<input type="checkbox"/>	9202											
<input checked="" type="checkbox"/>	Order											
<input type="checkbox"/>	Aff. Posting											
<input type="checkbox"/>	Status Rpt											
<input type="checkbox"/>	UCCJEA											
<input type="checkbox"/>	Citation											
<input type="checkbox"/>	FTB Notice											

Reviewed by: LV
Reviewed on: 03/20/2015
Updates:
Recommendation: Submitted
File 11 - Lee

DOD: 1-12-89		MARY ELLEN RODRIGUEZ and DOLORES TRUJILLO , Daughters, were appointed as Co-Administrators without IAEA and with bond of \$8,000.00 on 1-16-1990. Bond was filed and Letters issued on 1-17-1990. Nothing further was filed. The open estate was discovered and the Court set this status hearing. The I & A was filed 10-1-14, showing the estate value at \$30,000.00.	NEEDS/PROBLEMS/COMMENTS: Note: On 2-23-15, the Court confirmed the sale of real property and set status hearing for receipt of the proceeds into a blocked account (Page B). Please see status report filed in connection with the receipt summarized at Page B. 1. Need Petition for Final Distribution or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.
Cont. from 081414, 100214, 110614, 121814, 020215, 022315			
Aff.Sub.Wit.			
Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.		Reviewed by: skc Reviewed on: 3-23-15 Updates: 3-24-15 Recommendation: File 12A – Rodriguez	
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			

Probate Status Hearing RE: Receipt for Net Funds in Blocked Account

DOD: 1-12-89	DOLORES TRUJILLO , Daughter, is the sole remaining Administrators without IAEA and with bond of \$8,000.00.	NEEDS/PROBLEMS/ COMMENTS: 1. Need receipt for blocked account (MC-356).
	On 2-23-15, the Court confirmed the sale of real property and ordered the net proceeds of \$12,000.00 to be deposited into a blocked account.	
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
✓ Status Rpt		
UCCJEA		
Citation		
FTB Notice	<p>Status Report filed 3-24-15 states the petitioner has attempted to open the blocked account. The first time, she was incorrectly informed by a teller that she could not open one under these circumstances. After the attorney personally contacted the branch manager, he determined there was a miscommunication and assured the attorney that he would personally assist the petitioner when she returned. When she returned, she was informed that they would not open the account without a certified copy of the death certificate. Petitioner then proceeding to obtain a certified copy of the death certificate and returned to the bank the following week. However, without consulting Counsel, Petitioner intended to have the buyer wire funds into the account and did not have a check in hand at the bank. The bank informed Petitioner that the money had to be deposited when the account was opened. Petitioner has no vehicle and the buyer has been taking time from work to transport to the bank for this transaction. As such, Petitioner has not yet returned to the bank.</p> <p>As the procedure at Chase Bank is to allow the legal department a minimum of 7-10 business days to review a Receipt and Acknowledgment form, an additional 30 days is respectfully requested to allow Petitioner to schedule another trip to the bank with the buyer and to allow the bank to review and file the receipt.</p> <p>The First and Final Account and Petition for Final Distribution is ready for filing as soon as the funds are deposited. Counsel respectfully requests an additional 30 days for the filing of this petition as well.</p>	Reviewed by: skc Reviewed on: 3-23-15 Updates: 3-24-15 Recommendation: File 12B - Rodriguez

DOD: 12/23/11		CHRISTINE HAYS is Executor. Order and Judgment of Final Distribution was entered on 10/14/14. The order included a closing reserve of \$25,000.00. Minute Order dated 10/14/14 set this status hearing for an informal accounting of the closing reserve. Status Report filed on 03/12/15. Attorney Thomas Georgouses reports that a total of \$941.45 of the closing reserve was used to pay for bookkeeping, the CPA and bank fees. There remains a balance of \$24,124.51. Petitioner is prepared to make distribution of the closing reserve, less the \$4.00 bank fee, to: Christine Hays - \$6,030.12 Ann Hays Walorinta - \$6,030.13 Lynn Hays Kyle - \$6,030.13 Michael R. Hays - \$6,030.13 If the Court declines Petitioner's intention to distribute the remaining amount of proceeds previously held for reserve, Petitioner requests the amount to be held in reserve no exceed \$5,000.00 for no more than one year from the date of this hearing.	NEEDS/PROBLEMS/COMMENTS:
Cont. from			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input type="checkbox"/>	Notice of Hrg		
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<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
		Reviewed by: KT	
		Reviewed on: 3/23/15	
		Updates:	
		Recommendation:	
		File 13 - Hays	

Petition of Conservator for Instructions

		JOYCE V. DAVIS, Sister and Conservator of the Person and Estate with bond of \$333,000.00, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Petitioner requests to sell the conservatee's real property and vehicle because funds are needed for her upkeep.	<p><u>Note:</u> This petition was filed by the Conservator, in pro per, on 8-18-14. Pursuant to Declaration of Melvin K. Rube filed 3-6-15, he has now been retained to represent the Conservator and requests a 60-day continuance to file a supplemental inventory and appraisal, amend the accounting, and also file a petition to resign as conservator of the estate and for appointment of Bruce Bickel as successor conservator of the estate.</p>
Cont. from 093014, 102214, 121014			
Aff.Sub.Wit.		Note: The vehicle referred to in this petition has not been inventoried as an asset of the conservatorship estate.	The following issues remain noted for reference only:
Verified			
Inventory			<p>1. Petitioner's First Account filed 5-15-14 was not in compliance with applicable law, and was denied on 6-24-14. This "Petition for Instructions" filed 8-18-14 requests authority to sell various assets; however, it does not contain the information necessary for the Court to consider this type of request. Further, the Court may require the First Account to be settled before authorizing further action by the Conservator. See Probate Code §§ 1020, 1060, 2540, 2620, Cal. Rules of Court 7.575, Local Rule 7.1.1.C., and other applicable law and rules. Specifically, §2540 requires that the sale be discussed with the Conservatee.</p>
PTC			
Not.Cred.			<p>2. Based on the Inventory and Appraisals that have been filed, Petitioner's bond of \$333,000.00, based on her original estimate, is insufficient. Petitioner is reminded of her duty to increase bond pursuant to Cal. Rules of Court 7.204. Examiner calculates the appropriate bond amount to be \$502,194.24, not including the house, and also not including the vehicle that Petitioner refers to, because it has not been inventoried as an estate asset. If the house and vehicle are authorized to be sold, the bond amount will need to be adjusted accordingly.</p>
Notice of Hrg			
Aff.Mail			<p>3. The Conservatee is entitled to notice of this petition. See Probate Code §1460. (<u>Note:</u> Petitioner mailed notice of the amended account at Page B to the Conservatee, but not this petition.)</p>
Aff.Pub.			
Sp.Ntc.			Reviewed by: skc
Pers.Serv.			
Conf. Screen			Reviewed on: 3-23-15
Letters			
Duties/Supp			Updates:
Objections			
Video Receipt			Recommendation:
CI Report			
9202			File 14A - Thomas
Order			
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			

Second Amended Account and Report of Conservator and Petition for its Settlement

		JOYCE V. DAVIS , Sister and Conservator of the Person and Estate with bond of \$333,000.00, is Petitioner.	NEEDS/PROBLEMS/COMMENTS: Note: This petition was filed by the Conservator, in pro per, on 10-22-14. Pursuant to Declaration of Melvin K. Rube filed 3-6-15, he has now been retained to represent the Conservator and requests a 60-day continuance to file a supplemental inventory and appraisal, amend the accounting, and also file a petition to resign as conservator of the estate and for appointment of Bruce Bickel as successor conservator of the estate. The following issues remain noted for reference only: <p style="text-align: center;"><u>SEE PAGE 2</u></p>
		Account period: 3-14-13 through 3-14-14	
		Accounting: \$866,751.47	
		Beginning POH: \$ 11,334.12	
		Ending POH: \$780,811.53	
		Conservator: No compensation requested	
		Petitioner states the conservatee's automobile has not been sold. The car was used to transport the Conservatee and her six dogs to the veterinarian and to the pet store for food. The car has only been driven by the Conservator's husband with the Conservatee for this purpose. He took the car in for all recalls and maintenance. The insurance company was notified that the conservatee's (sic) husband would be the only authorized driver. The vehicle will be sold as soon as Conservator can obtain the pink slip. The DMV will not issue a new pink slip. The Conservatee did not file the Lien Satisfied/Legal Owner/Title Holder Release with the DMV. The vehicle was paid off several years ago, and the conservator wrote to Toyota, but has had no response. Conservator will follow up on this.	
		Petitioner states the home located in Chino Hills, CA, was in need of major cleanup and repairs due to Conservatee living there for years with health issues. Conservator has secured the property and has begun cleanup and hopes to sale the house because Conservatee will be unable to return to her home in the future. Funds will be used for her placement at Somerford Place. The condition of the house prevents it being rented, and there is no income being generated from the property. No furniture or furnishings have been sold or removed from the house. Conservator has begun to contact auctioneers and antique dealers.	
		Petitioner requests that the First Account be settled, allowed, and approved as filed, and all acts and proceedings of Petitioner be confirmed and approved.	
Cont from 121014			
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	w/o	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
✓	Letters	3-22-13	
	Duties/Supp		
	Objections		
	Video Receipt		
✓	CI Report		
✓	2620(c)		
	Order	x	
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		

NEEDS/PROBLEMS/COMMENTS:

1. Petitioner's Summary of Account states the beginning Property On Hand was \$11,334.12; however, it is unclear what this figure represents, as there is no schedule showing Beginning Property on Hand. The I&A and Supplemental I&A totaled \$781,540.22, of which \$397,060.22 was cash. That should be the beginning Property On Hand figure.

Further, the Summary then indicates \$20,000.64 in additional property received, \$55,189.81 in regular receipts, \$501.04 in gains, and \$779,725.86 as "other charges," which are all similarly unclear.

Further, it appears that many of the assets Petitioner originally categorized as "cash" are now categorized as "non-cash" in the Ending Property on Hand, and if that is the case, those assets require appraisal by the Probate Referee. See Probate Code §8900 et seq. This includes the characterization and appraisal of the retirement account and various insurance policies.

Need further amended account pursuant to §1060 et seq., and possibly amended I&A pursuant to §8900 et seq. Petitioner is strongly encouraged to seek assistance from an attorney going forward, as it continues to appear that non-attorney document services are not meeting her needs.

2. As noted on Page A, Petitioner's bond appears insufficient. However, it appears clarification regarding #1 is necessary above in order for to confirm an appropriate bond calculation. As noted on Page A, Examiner calculates that bond should be at least \$502,194.24, not including the house (because the Conservator does not currently have authority to sell the house) and not including the vehicle (because it was not inventoried as an asset of the conservatorship estate). Petitioner is again reminded of her duty to apply for increase in bond when appropriate pursuant to Cal. Rule of Court 7.204.
3. Petitioner's descriptions of various expenses are not sufficient to determine what the expenses were for. Specifically: "SIGNON" on 3-18-13, "AT HM REWA" on 3-26-13, and "PWA" on 4-15-13. Please note: Petitioner's other disbursements at various stores such as Costco and Target are similarly unclear; however, Petitioner provided pages and pages of copies of receipts thereafter. For future reference, copies of receipts are unnecessary and serve to add bulk and confusion to the accounting document. If properly prepared, receipts are unnecessary because the accounting should simply provide adequate descriptions of the transactions in the schedules. The only required documentation are bank statements and care facility statements pursuant to Probate Code §2620, unless otherwise requested by the Court.
4. The Disbursements Schedule indicates two donations to Greenpeace totaling \$100.00 in March and April 2013. The Court may require clarification with reference to Cal. Rule of Court 7.1059 (Standard of Conduct for Conservators of the Estate), specifically (b)(3), which prohibits making gifts with conservatorship estate funds without authorization.

Atty Jimenez, Irene (pro per – paternal aunt/Petitioner)

Atty Jimenez, Cutberto (pro per – paternal uncle/Petitioner)

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

Age: 10		<u>NO TEMPORARY REQUESTED</u>		NEEDS/PROBLEMS/COMMENTS:	
		IRENE JIMENEZ and CUTBERTO JIMENEZ , paternal aunt and uncle, are Petitioners.		<u>CONTINUED FROM 02/11/15</u>	
		Father: ALFREDO ORTEGA – Consent & Waiver of Notice filed 11/10/14		Note: Petitioners have also petitioned for guardianship of Natalie's sister, Vanity Ortega. The general guardianship hearing for Vanity is set for 05/21/15.	
Cont. from 011415, 021115		Mother: AMBER STICKLES – Consent & Waiver of Notice filed 02/02/15			
<input type="checkbox"/>	Aff.Sub.Wit.	<input type="checkbox"/>			
<input checked="" type="checkbox"/>	Verified	<input type="checkbox"/>			
<input type="checkbox"/>	Inventory	<input type="checkbox"/>			
<input type="checkbox"/>	PTC	<input type="checkbox"/>			
<input type="checkbox"/>	Not.Cred.	<input type="checkbox"/>			
<input type="checkbox"/>	Notice of Hrg	<input type="checkbox"/>	n/a		
<input type="checkbox"/>	Aff.Mail	<input type="checkbox"/>	n/a		
<input type="checkbox"/>	Aff.Pub.	<input type="checkbox"/>			
<input type="checkbox"/>	Sp.Ntc.	<input type="checkbox"/>			
<input type="checkbox"/>	Pers.Serv.	<input type="checkbox"/>	n/a		
<input checked="" type="checkbox"/>	Conf. Screen	<input type="checkbox"/>			
<input checked="" type="checkbox"/>	Letters	<input type="checkbox"/>			
<input checked="" type="checkbox"/>	Duties/Supp	<input type="checkbox"/>			
<input type="checkbox"/>	Objections	<input type="checkbox"/>			
<input type="checkbox"/>	Video Receipt	<input type="checkbox"/>			
<input checked="" type="checkbox"/>	CI Report	<input type="checkbox"/>			
<input type="checkbox"/>	9202	<input type="checkbox"/>			
<input checked="" type="checkbox"/>	Order	<input type="checkbox"/>			
<input type="checkbox"/>	Aff. Posting	<input type="checkbox"/>			
<input type="checkbox"/>	Status Rpt	<input type="checkbox"/>			
<input checked="" type="checkbox"/>	UCCJEA	<input type="checkbox"/>			
<input type="checkbox"/>	Citation	<input type="checkbox"/>			
<input type="checkbox"/>	FTB Notice	<input type="checkbox"/>			
				Reviewed by: JF	
				Reviewed on: 03/23/15	
				Updates:	
				Recommendation:	
				File 15 – Ortega & Saldivar	

16 Aliya Mackenzie Eroles (GUARD/P)

Case No. 14CEPR00666

Atty Eroles, Kayla Michelle (Pro Per – Mother – Petitioner)

Atty Eroles, Ricardo J. (Pro Per – Maternal Grandfather – Guardian)

Atty Eroles, Teresa L. (Pro Per – Maternal Grandmother – Guardian)

Petition for Termination of Guardianship

		See petition for details.	NEEDS/PROBLEMS/COMMENTS: 1. The Court may require notice to all relatives pursuant to Probate Code §1460(b)(5).	
Cont from 012815				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
	Notice of Hrg			X
	Aff.Mail			X
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
✓	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 3-23-15	
			Updates:	
			Recommendation:	
			File 16 - Eroles	

Age: 9 months		<p align="center"><u>TEMPORARY EXPIRES 03/25/15</u></p> <p>CANDICE ANGELIQUE MOSER, maternal grandmother, is Petitioner.</p> <p>Father: DAVID CONTRERAS – Declaration of Due Diligence filed 03/20/15 states that online search and speaking to relatives of mother have not yielded contact info for the father. It is believed he relocated to the Los Angeles area.</p> <p>Mother: SAMANTHA MOSER – Personally served on 10/16/14 and Consents per minute order of 12/03/14</p> <p>Paternal grandparents: UNKNOWN – Court dispensed with notice on 12/03/14</p> <p>Maternal grandfather: ROMAN GARCIA</p> <p>Petitioner alleges [See Petition for details]</p> <p>Court Investigator Samantha Henson filed a report on 11/25/14.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>CONTINUED FROM 01/28/15</u> Minute Order from 01/28/15 states: Mr. Harris is to file a Declaration of Due Diligence regarding his efforts to locate the father.</p> <ol style="list-style-type: none"> 1. Need Notice of Hearing. 2. Need proof of service of Notice of Hearing with a copy of the Petition for Appointment of Guardian of the Person at least 15 days before the hearing <u>or</u> Consent & Waiver of Notice <u>or</u> Declaration of Due Diligence for: <ol style="list-style-type: none"> a. David Contreras (father) – personal service required *unless diligence is found/Declaration filed 03/20/15 b. Roman Garcia (maternal grandfather) – service by mail sufficient
Cont. from 100714, 120314			
<input type="checkbox"/> Aff.Sub.Wit.			
<input checked="" type="checkbox"/> Verified			
<input type="checkbox"/> Inventory			
<input type="checkbox"/> PTC			
<input type="checkbox"/> Not.Cred.			
<input type="checkbox"/> Notice of Hrg	<input checked="" type="checkbox"/>		
<input type="checkbox"/> Aff.Mail	<input checked="" type="checkbox"/>		
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<input type="checkbox"/> Pers.Serv.	<input checked="" type="checkbox"/>		
<input checked="" type="checkbox"/> Conf. Screen			
<input checked="" type="checkbox"/> Letters			
<input checked="" type="checkbox"/> Duties/Supp			
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<input type="checkbox"/> Video Receipt			
<input checked="" type="checkbox"/> CI Report			
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<input checked="" type="checkbox"/> Order			
<input type="checkbox"/> Aff. Posting			
<input type="checkbox"/> Status Rpt			
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<input type="checkbox"/> Citation			
<input type="checkbox"/> FTB Notice			
		<p>Reviewed by: JF</p> <p>Reviewed on: 03/25/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 17 - Moser</p>	

Atty Ochoa, Janete M. (pro per – maternal grandmother/Petitioner)

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

Samuel, 13	<p align="center"><u>NO TEMPORARY IN PLACE:</u> <u>TEMPORARY DENIED ON 10/30/14 DUE TO NON APPEARANCE</u></p> <p>JANETE OCHOA, maternal grandmother, is Petitioner.</p> <p>Father: MANUEL KENNEDY – Personally served on 02/05/15</p> <p>Mother: LISA MAYFIELD – Personally served on 02/05/15</p> <p>Paternal grandfather: MANUEL KENNEDY – deceased</p> <p>Paternal grandmother: ISABEL KENNEDY – Personally served on 02/06/15</p> <p>Maternal grandfather: JACK MAYFIELD – deceased</p> <p>Siblings: MANUEL KENNEDY (17), MICHAEL KENNEDY (1), BRANDON GRAHAM (20) – Manuel & Brandon served by mail on 03/09/15</p> <p>Petitioner states [See Petition for details]</p> <p>Court Investigator Dina Calvillo filed a report on 12/09/14.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>CONTINUED FROM 02/11/14</u></p> <p>1. Need proof of service of Notice of Hearing with a copy of the Petition for Appointment of Guardian of the Person at least 15 days before the hearing <u>or</u> Consent & Waiver of Notice <u>or</u> Declaration of Due Diligence for:</p> <p>a. Samuel Kennedy (minor) – personal service required</p>
Isalyn, 10		
Marienna, 7		
Jaclynn, 3		
Cont. from 121714		
Aff.Sub.Wit.		
✓ Verified		
Inventory		
PTC		
Not.Cred.		
✓ Notice of Hrg		
✓ Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
✓ Pers.Serv.		
✓ Conf. Screen		
✓ Letters		
✓ Duties/Supp		
Objections		
Video Receipt		
✓ CI Report		
9202		
✓ Order		
Aff. Posting		
Status Rpt		
✓ UCCJEA		
Citation		
FTB Notice		

Reviewed by: JF
Reviewed on: 03/25/15
Updates:
Recommendation:
File 18 - Kennedy

Rudy Cruz

Atty Fierro, Aurora (Pro Per – Maternal Grandmother – Petitioner)
 Atty Chacon, Gina (Pro Per – Paternal Grandmother of Rudy – Competing Petitioner)
 Atty Nunez, Andrea (Pro Per – Mother – Objector)
 Atty Cruz, Rudy (Pro Per – Father – Objector)

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

Ezabella, age 12		<u>TEMPORARY EXPIRES 03/25/2015</u> <u>Please see petition and objections for details</u>	NEEDS/PROBLEMS/COMMENTS: Page 19B is the Hearing on Denied Fee Waiver filed by Gina Chacon. Note: Gina Chacon, Paternal Grandmother of Rudy Cruz, filed a competing Petition for Guardianship as to Rudy Cruz only. Hearing is set for 04/29/2015. 1. Need Notice of Hearing. 2. Need proof of personal service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice or declaration of due diligence for: <ul style="list-style-type: none"> Oscar Macias (Father of Ezabella and Juilia) Ezabella Macias (Minor) 3. Need proof of service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice or declaration of due diligence for: <ul style="list-style-type: none"> Paternal Grandparents of Ezabella and Julia (Not Listed) Maternal Grandfather (Not Listed) 	
Julia, age 11				
Rudy Cruz, age 3				
Cont. from				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input type="checkbox"/>	Notice of Hrg			x
<input type="checkbox"/>	Aff.Mail			x
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			n/a
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<input type="checkbox"/>	Video Receipt			
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<input type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order			
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<input type="checkbox"/>	Status Rpt			
<input checked="" type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
Reviewed by: LV				
Reviewed on: 03/23/2015				
Updates:				
Recommendation:				
File 19A – Macias & Cruz				

Rudy Cruz

Atty Chacon, Gina (Pro Per – Petitioner)

Hearing on Fee Waiver (Re: Deductions)

		GINA CHACON, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
Cont. from			
	Aff.Sub.Wit.		
	Verified		
	Inventory		
	PTC		
	Not.Cred.		
	Notice of Hrg		
	Aff.Mail		
	Aff.Pub.		
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	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
		Reviewed by: LV	
		Reviewed on: 03/23/2015	
		Updates:	
		Recommendation:	
		File 19B – Macias & Cruz	

19B

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

		<p>There is no temporary. Temporary was denied.</p> <p>SHIRLEY AVINA, step-mother, is petitioner.</p> <p>Please see petition for details.</p> <p>DSS Social Worker, Irma Ramirez's report filed on 3/17/15.</p> <p>Court Investigator Charlotte Bien's Report filed on 3/17/15</p> <p>Please see additional page</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. Need Notice of Hearing. 2. Need proof of personal service of the Notice of Hearing along with a copy of the Petition or Consent and Waiver of Notice or Declaration of Due Diligence on: <ol style="list-style-type: none"> a. Vinatta Robinson (mother) 3. Need proof of service of the Notice of Hearing along with a copy of the Petition or Consent and Waiver of Notice or Declaration of Due Diligence on: <ol style="list-style-type: none"> a. Paternal grandparents b. Maternal grandparents 4. Petition does not include the names and current addresses of the paternal and maternal grandparents. <p>Note: At the hearing on the temporary guardianship the court denied the temporary and ordered the minor have daily phone contact with Shirley Avina from 6pm to 7pm. Furthermore the court ordered visitation with Ms. Avina every Saturday from 10am – 6pm.</p>	
Cont. from				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
	Notice of Hrg			X
	Aff.Mail			X
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
✓	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
✓	UCCJEA			
	Citation			
	FTB Notice			
<p>Reviewed by: KT</p> <p>Reviewed on: 3/23/15</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 20 - Packard</p>				

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

Jorge, age 13		<p align="center"><u>Please see petition for details</u></p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. Need proof of personal service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice or declaration of due diligence for: <ul style="list-style-type: none"> • Jorge Gonzales (Minor) 2. Need proof of service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice or declaration of due diligence for: <ul style="list-style-type: none"> • Paternal Grandfather (Unknown) • Paternal Grandmother (Unknown) • Ruth Garcia (Maternal Grandmother) 	
Matthew, age 11				
Erika, age 9				
Federico, age 7				
Natalie, age 5				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
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	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			x
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
✓	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
✓	UCCJEA			
	Citation			
	FTB Notice			
<p>Reviewed by: LV</p> <p>Reviewed on: 03/23/2015</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 21 – Gonzales & Ortega</p>				

Atty Amparano, Joyce (Pro Per Petitioner, daughter)

Petition for Authorization to Administer Under IAEA with Limited Authority (Prob. C. 8002, 10450)

DOD: 10/26/2009		JOYCE AMPARANO , daughter, is Petitioner and requests appointment [as Administrator or as Special Administrator?] without bond.	NEEDS/PROBLEMS/COMMENTS: 1. Caption of the <i>Petition</i> does not request the type of administration sought by Petitioner, except that administration be authorized under IAEA with Limited Authority. CA Rule of Court 7.102 requires that the title of each pleading clearly and completely identify the nature of all relief sought or granted. Further, Item 2(b) and Item 2(c) of the <i>Petition</i> request appointment of Special Administrator with Limited IAEA authority, without bond. Need clarification of the Petitioner's request for appointment as administrator or special administrator. 2. Need Notice of <i>Petition to Administer Estate</i> and proof of mailed notice pursuant to Probate Code § 8110 for the persons listed in Item 8 of the <i>Petition</i> . 3. Need Confidential Supplement to Duties and Liabilities of Personal Representative form, pursuant to Local Rule 7.10.1 and Probate Code § 8404. ~Please see additional page~
Cont. from		Limited IAEA — OK	
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified	Decedent died intestate?	
<input type="checkbox"/>	Inventory	Residence — Fresno	
<input type="checkbox"/>	PTC	Publication — Reedley Exponent	
<input type="checkbox"/>	Not.Cred.		
<input type="checkbox"/>	Notice of Hrg	X	
<input type="checkbox"/>	Aff.Mail	X	
<input checked="" type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters		
<input checked="" type="checkbox"/>	Duties/Supp	X Supp	
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		

Probate Referee: **Steven Diebert**

NEEDS/PROBLEMS/COMMENTS, continued:

4. Need mandatory-use *Waiver of Bond by Heir or Beneficiary* form [Judicial Council DE-111 (A-d3)] signed by all of Decedent's heirs to be filed with the Court (**Note:** *Attachment 3(d)(3) Waiver of Bond attached to the instant Petition signed by the seven persons is insufficient.*)
5. *Petition* does not explain the reason that the Petitioner's daughter seeks appointment as administrator (or special administrator) rather than the Decedent's spouse (or former spouse). Need declination to act as administrator from Decedent's spouse pursuant to Probate Code § 8461.
6. **Item 3(e) of the *Petition* is incomplete re: whether Decedent was intestate or testate, and if testate, a copy of Decedent's Will must be attached to the *Petition*.**
7. Item 5(a) of the *Petition* is incomplete as to (3) or (4) re: registered domestic partner, and (7) or (8) re: issue of a predeceased child.
8. Item 8 of the *Petition* lists **JEANNETTE AMPARANO**, "current spouse" and lists **JEANNETTE AMPARANO (JARAMILLO)**, "former spouse." Two different addresses are listed as if these are two different persons. Need clarification.
9. Need additional information and authority regarding the Petitioner's basis for seeking to use a *Petition for Letters of Special Administration with Limited Authority* as the foundation for collecting the **FCERA** retirement benefit for Decedent's spouse, **JEANNETTE JARAMILLO**, through the Petitioner effectuating a Qualified Domestic Relations Order in a pending Fresno Superior Court dissolution action, if the Court were to appoint Petitioner as administrator.

Atty Rodriguez, Pablo Jr. (pro per – paternal grandfather/Petitioner)

Atty Rodriguez, Rebecca (pro per – paternal grandmother/Petitioner)

Petition for Appointment of Temporary Guardian of the Person

Lisa, 9		GENERAL HEARING: 05/18/15 PABLO RODRIGUEZ, JR. and REBECCA RODRIGUEZ , paternal grandparents, are Petitioners. Father: PETE RODRIGUEZ, JR. – Consent & Waiver of Notice 03/11/15 Mother: FELICIA GARCIA – Declaration of Due Diligence filed 03/19/15 Maternal grandfather: RICARDO GARCIA Maternal grandmother: MARY HELEN SANCHEZ Siblings: MARCELA GARCIA, PETE RODRIGUEZ, III, AMERISSA RODRIGUEZ Petitioners state [See Petition for details}	NEEDS/PROBLEMS/COMMENTS: 1. Need proof of personal service at least 5 court days before the hearing of Notice of Hearing with a copy of the Petition for Appointment of Temporary Guardian of the Person <u>or</u> Consent & Waiver of Notice for Felicia Garcia (mother). – Unless diligence is found. Note: The Petition indicates that the children have Indian ancestry. <u>Notice of Child Custody Proceeding for Indian Child</u> (Form ICWA-030) was served on the necessary parties on 03/12/15.	
Marcelo, 8				
Lorenzo, 7				
Cont. from				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
	Notice of Hrg			x
	Aff.Mail			
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			x
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
✓	UCCJEA			
	Citation			
	FTB Notice			
Reviewed by: JF Reviewed on: 03/25/15 Updates: Recommendation: File 23 - Rodriguez				

Petition for Preliminary Distribution

[illegible]